


RFP COVER PAGE

	Procurement Division 200 E University Avenue, Rm 339 Gainesville, FL 32601 (352) 393-8789 March 15, 2021		
	REQUEST FOR PROPOSAL: #RMDX-210025-GD Broker/Agent Insurance and Risk Management Consulting Services		
PRE-PROPOSAL MEETING: <input type="checkbox"/> Non-Mandatory <input type="checkbox"/> Mandatory <input checked="" type="checkbox"/> N/A <input type="checkbox"/> Includes Site Visit			
DATE: TIME: LOCATION:			
QUESTION SUBMITTAL DUE DATE: Monday, March 28, 2021, 3:00pm Eastern Time			
DUE DATE FOR UPLOADING PROPOSAL: Friday, April 9, 2021, 3:00pm Eastern Time			
SUMMARY OF SCOPE OF WORK: The City of Gainesville is requesting proposals from qualified providers of Broker/Agent services for the City of Gainesville's and Gainesville Regional Utilities' insurance, risk consulting and loss control service.			
For questions relating to this solicitation, contact: Gayle Dykeman, dykemangb@cityofgainesville.org			
Bidder is <u>not</u> in arrears to City upon any debt, fee, tax or contract: <input checked="" type="checkbox"/> Bidder is NOT in arrears <input type="checkbox"/> Bidder IS in arrears Bidder is not a defaulter, as surety or otherwise, upon any obligation to City: <input checked="" type="checkbox"/> Bidder is NOT in default <input type="checkbox"/> Bidder IS in default.			
Bidders who receive this bid from sources other than City of Gainesville Procurement Division or DemandStar.com MUST contact the Procurement Division prior to the due date to ensure any addenda are received in order to submit a responsible and responsive offer. Uploading an incomplete document may deem the offer non-responsive, causing rejection.			
ADDENDA ACKNOWLEDGMENT: Prior to submitting my offer, I have verified that all addenda issued to date are considered as part of my offer: Addenda received (list all) # Addendum 1			
Legal Name of Bidder: <u>HUB Public Risk, Inc.</u>			
DBA: _____			
Authorized Representative Name/Title: <u>Bart Gunter, President</u>			
E-mail Address: <u>Bart.Gunter@hubinternational.com</u> FEIN: <u>83-2100732</u>			
Street Address: <u>2811 NW 41 Street , Gainesville, Florida 32606</u>			
Mailing Address (if different): _____			
Telephone: (<u>352</u>) <u>727-4632</u> Fax: (<u>352</u>) <u>240-3905</u>			
By signing this form, I acknowledge I have read and understand, and my business complies with all General Conditions and requirements set forth herein; and,			
<input checked="" type="checkbox"/> Proposal is in full compliance with the Specifications.			
<input type="checkbox"/> Proposal is in full compliance with the Specifications except as specifically stated and attached hereto.			
SIGNATURE OF AUTHORIZED REPRESENTATIVE: <u><i>Bart D. Gunter</i></u>			
SIGNER'S PRINTED NAME: <u>Bart Gunter</u> DATE: <u>4/7/21</u>			

This page must be completed and uploaded to DemandStar.com with your Submittal.

Proposal For:
City of Gainesville
Broker/Agent Insurance and Risk
Management Consulting Services
#RMDX-210025GD



Submitted by:

Bart Gunter, President
HUB Public Risk, Inc.

Brian Scarborough, Area Executive Vice President
HUB Florida Gainesville

HUB International Florida
HUBinternational.com



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B. Technical Proposals

April 9, 2021

HUB Public Risk, Inc.
Bart Gunter, President
HUB International Limited
2811 NW 41 Street
Gainesville, FL 32606
(352) 727-4632, bart.gunter@hubinternational.com

Dear Members of the Committee;

On behalf of HUB Public Risk, thank you for the opportunity to respond to your Request for Proposal for the City of Gainesville Broker/Agent Insurance and Risk Management Consulting Services.. Please accept this as our letter of acceptance to the terms and conditions of this RFP. Our goal is to demonstrate that HUB Public Risk is the ideal partner to provide the City with superior brokerage and consulting expertise tailored specifically to your needs, as well as highlight additional value added capabilities and services that compliment your risk management efforts.

We believe HUB Public Risk is the most qualified broker partner given our intimate knowledge and expertise of the public and private sector. We differentiate ourselves in the following way:

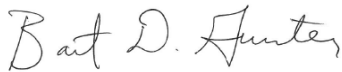
- HUB Public Risk has the team to provide the support you need. Our team will be led by Brian Scarborough, Area Executive Vice President of our Gainesville office and Bart Gunter, President of HUB Public Risk. HUB has specialists across Florida from which our team will draw additional support, expertise, alternative coverage structures and more.
- HUB Public Risk has the tools and resources you need: HUB has access to expansive tools and support that allows for the analytics, CAT modeling, benchmarking and future cost and reserve analysis that you require. Our specialty practice departments are the strength of our organization. In addition, these practices include risk services, compliance, wellness, human capital consulting and workforce productivity.
- HUB Public Risk will be a partner who is committed to developing a long-term relationship. We will bring innovative ideas to assist the Risk Management Program of the City of Gainesville by utilizing a proactive account team focused on good communication. Our goal together will be to develop a strategic consultative approach to managing your coverages and claims. We will help offload tactical administration from your staff. We understand your business and are committed to the safety of the public and your employees while constantly looking for ways to improve coverage and cut costs.
- HUB Public Risk proposes a comprehensive risk management and risk analysis process that will begin with a meeting between all the City of Gainesville and HUB staff involved in the City of Gainesville's risk management. HUB's team will include Brian Scarborough, Sam Rogers, Bart Gunter and Jim Duncan from HUB Public Risk; Ron Taylor, Carrie Cherveney and James Peterson from Risk Services, and Sheila Best and

Teresa Beaudoin from HUB Account Management. Together we will develop the Risk Management Service Plan and Timeline for the City of Gainesville.

- We believe a comprehensive review of all the City of Gainesville property should be one of our first projects. This review will identify which property should be insured, what perils to insure against, and what are reasonable limits of insurance. We also would include catastrophic (CAT) modeling and risks associated with loss that may not be insured or insurable. Ron Taylor will be our property modeling leader and he has provided similar services to many of our clients displaying high value property schedules.
- It is our experience that a review of all contracts with the City of Gainesville vendors and contractors is vital to developing an appropriate risk management program. This is a service that our team has performed for many governmental and quasi-governmental entities within the State of Florida and gives us a unique perspective to this key risk management process.

We look forward to delivering comprehensive Property & Casualty and Risk Management solutions as HUB Public Risk's partnership with the City of Gainesville continues to grow and strengthen.

Sincerely,



Bart Gunter
President of HUB Public Risk, Inc.



Brian Scarborough
Area Executive Vice President

Markets and Specialty Programs

Florida is unique in that it has specialty carriers and pools specific to public entities. These were created to fill the gap when standard carriers began limiting their property exposure in coastal areas. While these programs provide a valuable service, there is risk sharing and maximum limits per loss that could affect the City of Gainesville's ability to recover from a major loss.

HUB intentionally does not have ownership in any of the public risk specialty carriers in Florida, such as FMIT and PGIT. Ownership of private markets for public risk clients could create the appearance of a conflict of interest, reluctance of the standard markets and pressure to do business with an in-house market.

Our approach is to work with the specialty carriers and the standard markets equally to offer the City of Gainesville several options each year. The goal is for you to be able to make an intelligent and informed decision on the best way to insure your risk in a cost-effective way. We are free to work with any and all markets including FMIT, PGIT and other direct programs.

HUB has access to virtually all major insurance carriers and has effective working relationships with over 650 insurers. The volume of business we represent for these insurers further enhances the knowledge and experience we bring to the marketing effort. Where needed, we have access to their top management and home office decision makers. As a result, we have effectively negotiated programs of coverage for even the most difficult risks.

Customer Centric Carriers (3C)

HUB International fosters a strong collaboration with insurance carriers who understand and share our vision. In order to meet the needs of our customer segments and deliver an enhanced customer experience, we have sought out strategic relationships with a select group of carriers. We refer to these carriers as Customer Centric Carriers (3C Carriers). We have established Customer Centric Carriers on both a national and regional level.

There are many benefits to working closely with 3C Carriers as we build a customer-centric organization. In addition to executive-level focus on the needs of our business, these carriers have committed to helping HUB in the following ways:

- Provide access to the most experienced underwriters and claims resources
- Jointly develop and market industry leading co-branded products
- Integrate technology and increase information sharing
- Improve alignment of carrier product segments
- Provide deeper access to risk management and other customer services
- Provide the highest level capacity for future risks
- Help fund the development of new resources for our customers

We will continue to do business with many other insurance companies in order to meet our customers' needs; however, our philosophy is to focus on fewer markets but always do the right thing for the customer.

Sampling of the Insurers we represent in Florida:

- Chubb
- Auto-Owners
- CNA
- Zurich
- Travelers
- Cincinnati Insurance
- FCCI
- Westfield Insurance
- Hartford
- Old Dominion Insurance (Main Street America Group)
- Liberty Mutual
- Nationwide
- Philadelphia Insurance (Tokio Marine)
- Berkshire Hathaway
- Ace
- Markel
- Great American
- Hanover
- Progressive Insurance
- Allstate Insurance
- Zenith Insurance
- Bridgefield Insurance
- Employers Group
- Insurance Company of the West (ICW)
- Amtrust

Critical Path Process

Our innovative **Critical Path** methodology, alerts the entire team of changes in the marketplace, new carriers and changes in appetite. HUB approaches the marketing of any program from a risk management standpoint. Utilizing HUB's innovative **Critical Path** methodology, a cross-disciplinary leadership team led by our regional Chief Executive Officer meets twice a month to brainstorm client renewals scheduled to occur with a 120-day upcoming window. The team roundtables each client's risk profile, premium, loss experience, and marketing strategy to maximize the impact of our market canvass and negotiations, with appropriate follow-up actions and oversight through successful conclusion.

Together we will:

- Review your existing exposures
- Review appropriate risk management alternatives
- Review marketing options in the current insurance environment
- Prepare a professional submission, targeting your goals
- Negotiate with underwriters for the most favorable terms and conditions
- Analyze and compare the quoted programs
- Present options

Instead of trying to be all things to all clients, we focus on what we do best – delivering superior value in insurance brokerage and risk advisory service – while maintaining strategic alliances with a variety of professional service providers with skills complementing our own. HUB’s mission is to serve as the risk manager and insurance market advisor for the City of Gainesville.

Schedule of Work

We deliver our mission using a dedicated timeline so that responsibilities and deadlines are clear to all parties. Below is our proposed timeline, however we do recognize that this can be adjusted due to your deadlines and Board meeting schedules.

Function	Tasks	Timeframe
Analysis / Analytics	<ul style="list-style-type: none"> ○ Perform extensive review of existing program. ○ Review and analysis of the City of Gainesville exposures. ○ Complete CAT modeling for all property controlled the City of Gainesville ○ Perform Loss Analysis. ○ Discuss Risk Management and how to best integrate our Risk Services team. ○ Discuss trends within Insurance and Legislation. 	Upon appointment
Market Strategy	<ul style="list-style-type: none"> ○ Define renewal strategy, including pricing and coverage objectives, with the City of Gainesville. ○ Set renewal timelines and milestones. ○ Discuss options for coverage and alternatives to levels of risk retention. ○ Identify target markets and pre-qualify through initial underwriter meetings. ○ Define policy wording requirements. ○ Analyze strengths / weaknesses of carrier services including loss control and claims handling. 	120 days prior to renewal
Document Preparation and Market Submission	<ul style="list-style-type: none"> ○ Assemble comprehensive insurance submission in format preferred by underwriters. ○ Prepare manuscript policy forms for inclusion with insurance submission. ○ Review Risk Control and Claims service requirements with specifically defined process and reporting requirements. ○ Review final insurance submission and service requirements with the City of Gainesville prior to distribution to underwriters and service provider firms. ○ Finalize selection of carriers to receive submission and invite service providers to respond. ○ Validate financial ratings of selected carriers and qualifications of selected services firm. 	90 days prior to renewal
Deliver Market Submission	<ul style="list-style-type: none"> ○ Distribute submissions and service requirements and verify receipt. 	60 days prior to renewal

Function	Tasks	Timeframe
	<ul style="list-style-type: none"> ○ Set up market meetings with carriers to review safety & loss control. 	
Market Negotiation	<ul style="list-style-type: none"> ○ Schedule meetings with underwriters. ○ Foster the City of Gainesville’s relationship with underwriters. ○ Follow-up on any requests for clarifications or additional data from underwriters. ○ Monitor progress of carrier proposal development and keep the team fully apprised of all developments. 	60 - 30 days prior to renewal
Proposals Analysis	<ul style="list-style-type: none"> ○ Analyze carrier quotations and subject analysis to peer review. ○ Qualitative review of coverage terms and conditions, policy forms, other program considerations (such as collateral, admin requirements, carrier history/capability, etc.). ○ Quantitative review of premium. ○ Prepare and present insurance pricing comparisons. ○ Prepare and present review of proposed terms and conditions, policy forms, administrative requirements, etc. ○ Offer recommendations and rationale. 	30 – 10 days prior to inception
Coverage Binding	<ul style="list-style-type: none"> ○ Create binders for transmittal to carriers . ○ Require signed binders from carriers prior to program inception. ○ Transmit all binders to the City of Gainesville noting coverage summary, schedule of subjectivities, and premium breakdown ○ Review and Issue needed certificates. 	Prior to renewal
Post Policy Issuance	<ul style="list-style-type: none"> ○ Deliver policies and review with the City of Gainesville. ○ Assist the City of Gainesville in claims management. Utilize our claims management experts as needed on large claims. 	On Going

Client Service Standards

HUB Public Risk, Inc. is committed to the achievement of excellence in service to your organization via our:

- Experienced, qualified team
- Knowledge of the marketplace
- Commitment to quality
- Sense of urgency
- Creativity
- Professionalism
- Communication skills

We understand that your account requires a special kind of service. You want us to understand the marketplace, know your underwriters and be a partner with the relevant insurance carriers. Price is always an issue, but it is not the basis on which we manage risk. By making the buyer part of the ongoing servicing and planning of the program, HUB achieves a level of

communication and trust which bonds our relationship. Because of the importance and unique nature of your account, HUB has established performance standards that will communicate to you our commitment to excellence in client service.

These standards are:

- A. The Account Executive will make contact at least once a month to update you on any open items. You are likely to have regular conversations and communication with the Account Executive as a matter of course and you should expect timely responses.
- B. The Renewal Timeline will be followed as previously outlined. Special emphasis will be given to pre-renewal meetings to review the program with your Client Service Team. These meetings will include:
 - a. A recap of current program.
 - b. A review of the current marketplace.
 - i. alternative markets.
 - ii. alternative programs.
 - c. Status Report on Services.
 - i. provided by HUB.
 - ii. provided by insurer.
 - iii. provided by other third parties.
 - d. A discussion of HUB projects completed during previous year.
 - e. Developments and trends within your operation.
 - f. New projects with clearly defined deadlines and responsibilities.
 - g. A preliminary renewal strategy with goals and deadlines including discussion of any potential competition.
 - h. A detailed written summary of this meeting will be prepared by the Account Manager and sent to you.
- C. A minimum of an annual meeting will be planned between you and insurance company personnel.
- D. Where required, written claim and loss control procedures will be developed and distributed to your claims administrator, insurers and other service providers.
- E. Stewardship meetings will be held with your senior management team annually.

Service Philosophy

People

- Recruit new talent to broaden the expertise available to our customers.
- Offer enhanced training and development opportunities for all employees to enable us to keep current on things our customers need to know about.
- Empower individuals and teams to define and shape the customer experience - allowing us to tailor our solutions to your needs.
- Foster interaction among customers, communities, carriers and colleagues - to leverage all available resources on your behalf.

Product

- Gain a deep understanding of customer needs and build solutions and products specific to each customer segment - this means we are committed to being more than your insurance broker - we want to be a solution provider.
- Mobilize resources to focus on our Customer Centric Carriers (3C Carriers) within both retail and wholesale businesses. This allows us to focus on delivering the full range and

depth of offerings from a narrower group of insurers. While we continue to represent all carriers, we feel a stronger partnership with a few providers that deliver a better overall product and experience to our customer.

- Using our income to enable additional investment in our people and technology, leading to better customer solutions.

Process

- Develop new and effective ways to communicate with and serve our customers - this has led to development of key tools such as our HUB Connects newsletters, RMIS systems and other key resources that we deliver to help make your customer experience unique.
- Achieve greater efficiency and accuracy through the use of new technology - this allows us to better manage the quality of the service that we provide our customers and assure quality and timeliness.
- Share best practices, re-design systems and consolidate operations in order to deliver a more consistent and rewarding customer experience.

Client Services Platform

Our service platform ensures we are in constant communication with you and enables us to quickly respond to your needs. More importantly, the protocol fosters a proactive engagement/planning model that identifies many situations before they become an issue or disruptive element to you or your employees.

Our client communication standards can be regimented to the frequency and delivery method unique to our clients' needs and requests, whether that is face-to-face meetings, webcasts, teleconferences or electronic communications.

For example:

- Monthly Service Calls
- Annual Service Calendar: establishes monthly goals and objectives
- Multi-year strategic plan: establishes long term goals and measurable results
- Client Satisfaction Surveys
- Pre and Post Renewal Meetings

Risk Services Overview:

The following page is an overview of how HUB Public Risk delivers expertise and superior service to our public clients. We advise our clients on how to confidently identify, quantify and reduce risk through tailored solutions, so that you can fulfill your responsibility to the community. Additionally, we maintain strategic alliances with a variety of professional services providers with skills complementing our own. This arrangement enables us to assemble the best-qualified resources to address virtually any risk-related issue. The goal of our consultative approach is to improve efficiencies, reduce accidents and lower costs.

We match our expert resources to meet the specific needs of our clients. Our consultants have a wide variety of specialties in areas such as property risk engineering, property valuation, liability & contractual risk transfer, risk management information systems (RMIS), employee

safety & health, organizational resilience & cyber risk, industrial hygiene, workforce productivity, and additional niche expertise.

Claims advocacy is a vital technical discipline that can reduce loss costs and assist the City of Gainesville in receiving the full value from your insurance policies in time of need. Our Risk and Claims Consultants include board-certified and degreed safety, security, property, environmental, and claims professionals averaging over 20 years of experience.

HUB's team closely monitors legislative and other regulatory changes regarding insurance and risk management. This includes staying informed of changes to OSHA and Department of Labor regulations. The changes will be communicated in direct meetings, as well as in a monthly newsletter that HUB provides to all of its risk management clients.

The HUB Risk Services Division has over 85 risk consultants with a wide variety of specialties and expansive experience located throughout the United States and Canada with partnerships around the globe.

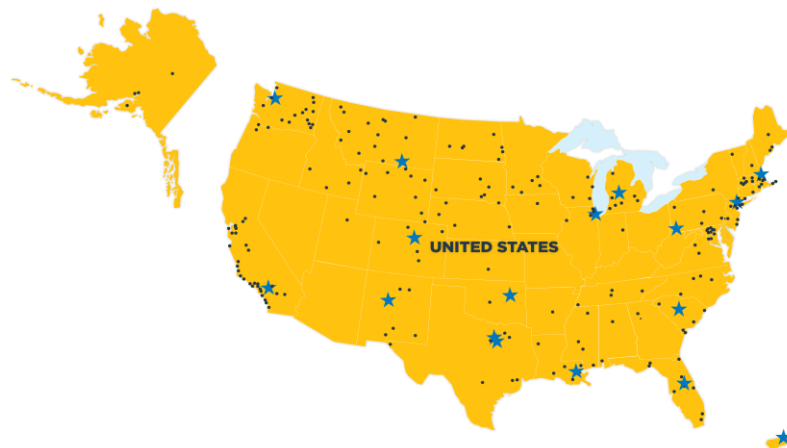
Our Value Proposition

We advise you on how to confidently identify, quantify and reduce risk through tailored solutions so that you can protect what matters most: Your people, property and profitability.

With experts in all functional areas and over 100 industries, our team has the proven knowledge and experience to assist clients in identifying current and potential risks, implementing controls to reduce exposure to loss, and improve productivity. In addition, we partner with clients to create claims management processes and address claim issues should they occur

Our Difference

HUB has a very deep bench of consultants and specialists ready to assist City of Gainesville when needed. There are no geographic or financial barriers when working with HUB. Other brokers either do not have the expertise or lack the size and market relationships to grow alongside an international business.



Our Resources

While others may have limited specialty resources, HUB has developed a consulting model that is unlike any other. Our investment in the risk services team means additional staff and professional development, specialty consulting, technology improvements and risk management resources to afford our clients unparalleled access to state-of-the-art resources.

Risk Services Offerings

HUB International specializes in a wide variety of risk services products and consultancy services. The specific services to be provided by the HUB Risk Services Division will be based upon your goals as well as the application of our consulting approach and methodology. This variety of disciplines enables HUB to respond to your specific risk control needs and objectives. Because we serve clients of all sizes, we can offer solutions that are properly scaled to meet the needs of your business.

Risk Control Services

- Regulatory Compliance
- Ergonomics Improvement
- Client Advocacy/Carrier Oversight
- Property Risk Engineering
- Safety Management
- Fleet Risk Management
- Construction Safety Management
- Environmental Management
- OSHA 10/30hr Courses
- Management/Employee Training
- Audit and Inspections

Specialty Risk Services

- Cyber Risk Management
- Enterprise Risk Management
- Workforce Productivity
- Crisis Management
- Business Continuity Management
- Emergency Management
- High-risk Claims Identification Tools
- Clinical Risk Management
- Entertainment Risk Management
- Travel Risk Management
- Industrial Hygiene

Strategic Partnerships

- Online Training Providers/Developers
- Property/Process Engineering Firms
- Web-based Continuity Planning Systems
- Environmental Testing Firms
- Art Preservation/Recovery Firms
- Pre-Hire Screening Tools
- Actuarial/Forensic Accounting Firms
- Telematics Providers
- Cyber Risk Assessment Firms
- Disaster Recovery Firms
- Outsourced Health Services Providers

- Safety Project Review/New Facility Protection Reviews
- Product Liability Assessments
- Hazard Assessments
- Environmental Compliance
- Risk Management Information System (HUB RMIS)

We partner with you to work toward two common goals: reduce your Total Cost Risk and make you more resilient to losses and operational disruptions.

Reducing Loss Costs

Risk control and claims advocacy are vital technical disciplines that can reduce loss costs and, in turn, an organization's total cost of risk. Risk control seeks to eliminate and reduce hazards that cause property and casualty losses, while claims advocacy exacts the full measure of value from your insurance policies at time of need. The HUB Risk Services Division has consultants located throughout the United States and Canada. An organizational structure including corporate and regional leadership, local consultants and specialty practices promotes a consistent service model across a variety of core competencies, while enabling local team members to address every client's specific risk issues. The Division includes board-certified and degreed safety, security, property, environmental, and claims professionals averaging over 20 years of experience in many areas.

Loss Control Services

As a broker partner, HUB endeavors for the City of Gainesville to rely on HUB as loss control specialists that can complement the existing internal management programs. HUB will provide on-the-ground assessment tools specific to safety management and create new programs as appropriate to provide loss control.

HUB will identify existing processes in place that include previously completed risk assessments, on-going recommendations, employee training matrix, required employee safety training needs, and existing policies and procedures for fixed asset use and controls.

Although we would need to determine the specific needs and tailor a risk services program accordingly, we expect our work in this engagement to revolve primarily around:

- Assessing risk exposures
- Developing and overseeing property conservation, life safety, and travel/security programs, in conjunction with your insurers
- Conducting physical surveys, as an adjunct to your insurers' engineering resources
- Property and casualty loss causation analysis and development of corrective strategies
- Advocating for coverage when unclear

Quality Control and Quality Service

The following is an example of our quality control program for Risk Management groups. This will be part of our initial meeting to customize and identify specifically what the City of Gainesville needs.

Function	Service	Timeframe
Administrative	<ul style="list-style-type: none"> Remit all binders and policy confirmation within 72 hours of being bound with insurers. 	Annually, no later than 7 days prior to expiry
	<ul style="list-style-type: none"> Remit all policies and endorsements on a timely basis. 	Annually, no later than 60 days after effective date
	<ul style="list-style-type: none"> Provide a summary of limits, conditions and exclusions with every policy issued. 	Annually
	<ul style="list-style-type: none"> Provide schedule of insurance. 	Annually
	<ul style="list-style-type: none"> Provide timely advice and response to insurance related matters. 	Ongoing
	<ul style="list-style-type: none"> Issue certificates of insurance within 2 business days and any other evidence of insurance required from time to time. 	As requested
Risk Control	<ul style="list-style-type: none"> Identification of risks through site reviews and discussion. 	Annually
	<ul style="list-style-type: none"> Review of contracts, leases and agreements for insurance and indemnity requirements. 	As requested
	<ul style="list-style-type: none"> Obtain detailed loss statistics from insurers, review and provide copies regularly. 	As required
	<ul style="list-style-type: none"> Review and provide copies of insurance company inspection reports. 	As required
	<ul style="list-style-type: none"> Identification of uninsured risks. 	As made by the insurer
Claims	<ul style="list-style-type: none"> Provide overall advice on claims matters. 	As required
	<ul style="list-style-type: none"> Report loss to insurers immediately upon notice from the City of Gainesville and assist on the administration / handling of claims. 	As required
	<ul style="list-style-type: none"> Make arrangements for claims adjuster on behalf of the insured. 	As required
	<ul style="list-style-type: none"> Assist in the development and submission of the statement of claim. 	As required
	<ul style="list-style-type: none"> Provide advocacy services. 	As required
	<ul style="list-style-type: none"> Assess subrogation potential. 	As required
	<ul style="list-style-type: none"> Expedite payment of loss from insurers. 	As required
Insurance Placement	<ul style="list-style-type: none"> Keep abreast of insurance market trends and seek out the most favorable terms and conditions. 	Annually and from time to time
	<ul style="list-style-type: none"> Data collection for renewal purposes; review 	Annually, 90 days prior

Function	Service	Timeframe
	<p>appropriateness of coverages, limits and deductibles.</p> <ul style="list-style-type: none"> ○ Evaluate the stability and financial condition of the City of Gainesville's insurers and any prospective insurer. ○ Annual review of insurance program. ○ Submission to underwriters for quotation. ○ Inform the City of Gainesville of renewal developments and desirability of insurer meetings. ○ Negotiate competitive premium costs for policies through insurer(s) agreed upon by the City of Gainesville. ○ Delivery of quotes to the City of Gainesville prior to the expiry date of current coverages. 	<p>to expiry</p> <p>Annually</p> <p>Annually</p> <p>Annually, and as necessary</p> <p>Annually, 60 days prior to expiry</p> <p>Annually, 30 days prior to expiry</p> <p>As required</p>
General	<ul style="list-style-type: none"> ○ Issue an annual timetable detailing service specification. ○ Provide an annual service report including the following information: <ul style="list-style-type: none"> ● Summary of insurance. ● Detailed account of number of hours devoted to service of the account. ● Market status report. ● Program performance (i.e. cost relative to prior years, program enhancements or reductions). ● Recommendations. ○ Attend to reasonable ad hoc requests and inquiries in a timely manner. 	<p>Annually, 8 weeks prior to expiry</p> <p>Annually</p> <p>As required</p>
Meetings	<ul style="list-style-type: none"> ○ Meet with the City of Gainesville staff to review insurance, claims or risk management issues. ○ Pre-renewal review meeting; information gathering. ○ Review and approve insurance specification submission to underwriters. ○ Obtain quotations / terms and conditions and agree basis for renewal. ○ Agree basis for renewal and arrange / confirm placement. 	<p>At mutually agreed intervals</p> <p>8 weeks prior to renewal</p> <p>8 weeks prior to renewal</p> <p>1-2 weeks prior to renewal</p> <p>Prior to renewal</p>
Potential Services	<ul style="list-style-type: none"> ○ Arrange risk consulting services for the purpose of risk identification, assessment and mitigation. ○ Risk finance and consulting. 	<p>As required</p> <p>As required</p>

C. Price Proposal

PART 3 – PRICE PROPOSAL

Proposer Company Name: HUB Public Risk, Inc.

The City prefers a fixed fee contract, but will consider other remuneration strategies. Full disclosure of all revenues generated from the services performed under this contract is required. It is the City's preference to have a fee based cost proposal which should identify which of the required services are included in the fee and any additional fees that may be incurred

Fee based cost: \$139,000

NOTE: When cost estimating air travel, the City allows for Coach fare only. In addition, long distance phone calls, printing, and other administrative costs may be billed at cost only – no mark-up. Evidence of these expenditures will be submitted when invoicing the City.

Submitted by:

Bart Gunter

Name (printed)

Bart D. Gunter

Signature

April 7, 2021

Date

President

Title

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D. Qualifications

1. Minimum 10 years with public entities of equal size and complexity.

HUB Public Risk, Inc. has a minimum of 10 years of experience with insurance being our primary business. HUB Public Risk, Inc. has the following government entities as clients in the State of Florida during the past 10 years:

<ul style="list-style-type: none"> • Central Florida Expressway Authority • Leon County School District • Wakulla County School District • District School Board of Madison County • Bay County School District • City of Panama City • University of Central Florida • University of Florida • Florida State University • Tallahassee Community College • Visit Florida • Enterprise Florida 	<ul style="list-style-type: none"> • Florida Housing Finance Corporation • University of North Florida • Florida Community College of Jacksonville • City of Tallahassee • Florida League of Cities • Florida Association of Counties • Florida School Boards Association • Florida Citrus Sports • Career Source Pinellas
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HUB International has an excess of 150 public entity clients throughout the United States with \$500,000,000 in premium:

City of Nashua	Sandoval County
City of Manchester	Millcreek Township Supervisors
City of Riverside	City Of Chilliwack
City of Chicopee	Santa Fe County
Town of Cary	Lincoln County
City of Boulder	City of Lewiston
City of Pueblo	Town of Saugus
City of Bellingham	City of Aurora
City of Opelousas	Village of Niles
City of Carlsbad	City of Lawrence
City of Grand Junction	Campbell County
City and County of Broomfield	Washakie County
San Diego Unified Port District	Holmes County
Town of Salem New Hampshire	City of Porterville
Westmoreland County	El Paso County Water Improvement
Eastern Municipal Water District	Stone County Board of Supervisors

Pattern Renewable Holdings Canada ULC	The Geo Group, Inc.
City of Hemet	City of Hesston
Stanly County	City of Ottawa, Kansas
City of Brighton	Town of Swampscott
Town of Agawam	Summit County
County of Stanislaus	City of Alpena
City of Fort Collins	City of Methuen
City of National City	City of Wasco
City of Fort Worth	City of Euless
Lake County (Indiana) Government	City of Fayetteville
City of Everett	Sedgwick County, Kansas
Corporation of the County of Simcoe	St. John the Baptist Parish Sheriff
Aerion Corporation	City of Hamlet
City of Arvada	Corporation of the City of Dawson Creek
Teller County Government	Twin River Management Group, Inc.
City of La Verne	Grady County Criminal Justice Authority
Brazos River Authority	City of North Kansas City, MO
City of New Orleans	City of Ruidoso Downs
City of Westfield	City of Wylie
County of Erie	Alamance County
City of Artesia	Village of Lansing
City of Twin Falls	City of Melissa
School City of Hammond	City of Whittier
City of Monrovia	Town of Elon
Village of Ruidoso	Environmental Defense Fund Incorporated
City of Tomball	North Central Kansas Regional Juvenile Detention Facility
Grant County	Marshall County Board of Supervisors
City of Sapulpa	Corporation of the Town of Essex
City of Woodstock	Geary County
Stevens County	City of Sheboygan Falls
Hancock County Board of Supervisors	Whitehall Township - Lehigh Co
City of Escondido	City of Kingsburg
City of Poway	City of Belding
City of Mobile	Millcreek Township - (Erie)
St. Mary Parish Local Government	City of Rapid City
City of Socorro	City of Las Vegas
Linn County	Pueblo County
City of Las Vegas	City of Rowlett
Beloit City Employees	NIMBL Worldwide
Pueblo County	City of Anthony

2. Must have experience with a power generating utility having at least 400MW of generating capacity

HUB Public Risk has worked as broker consultant with the City of Tallahassee for the past seven years. The City, between its two power generating stations Hopkins and Purdom, generates 746 MW power generating capacity.

3. Experience with the marketing and placement of a complex insurance program, including the placement of a property program with a minimum total insured value of \$500,000,000.

Please see list of account on Proposal pages 17 and 18. HUB insures over 150 cities of which a good number have a total insured value of over \$500,000,000.

4. Property placement must have a significant boiler and machinery component.

HUB Public Risk has experience placing property insurance with values equivalent or higher than those requested. We assess the needed values exposed to equipment breakdown/boiler & machinery to ensure this significant exposure is properly addressed within the property policy or on a stand-alone policy.

5. Service team should have a public entity client with a minimum insurance placement of \$3 million.

The Service team listed below includes members that insure the City of Tallahassee, with premium in excess of \$3 million.

Teams	Team Member	License Number
Service Team 1	Brian Scarborough	FL A233169
Service Team 1	Sheila Best	FL A021020
Service Team 2	Bart Gunter	FL A106729
Service Team 2	Jim Duncan	FL A073251
Service Team 2	Teresa Beaudoin	FL A017038

6. Proposer shall have experience coordinating loss control visits with carriers.

Members of your HUB Service Team will take a leadership role in Loss Control visits by the carriers. This includes coordinating and scheduling the visits, being onsite while the visits are performed and assisting the City of Gainesville in response to any recommendations made by carriers. As part of our first meeting with the City, we would like to learn how the City has been impacted by these visits in the past and develop a plan to take advantage of them in the future. Depending on the type of visit, coordination will be handled by Brian Scarborough or Jim Duncan.

7. Prior experience with a transit operation is preferred.

HUB Public Risk's expertise in transit operations come in three different forms; Jim Duncan has worked with large fleet exposures for over 30 years. This includes trucking, buses, limousines and service fleets. Second, HUB Florida currently insures or has insured a city owned transit company, and several large transit operations some of which specialized in work with the disabled. Lastly, Scott Fouts in our Risk Services Division has in excess of 15 years' experience providing risk management, safety, environmental, claims assistance and compliance to large fleet and transportation clients.

Background of HUB International



The Resources of a Global Leader

- 450+ offices across North America
- 5th largest insurance broker globally
- 14,000+ employees
- 1M+ clients around the globe
- 92% client retention
- \$12B+ in premiums

HUB International, Inc. (HUB) is a privately-held leading global insurance brokerage, founded in 1998 and headquartered in Chicago, IL. In addition to offering a broad array of employee benefits, property and casualty, personal lines, investment and risk management products and services, HUB has unmatched capabilities for helping clients manage their total cost of risk. We currently have over 14,000 employees across more than 450 locations in North America.

HUB began with the merger of eleven independent, privately-held insurance brokers in Canada in 1998. Today, we continue to grow both organically and through acquisition. We are now the 5th largest broker in the world. Our acquisition strategy is focused on completing our U.S. presence, as well as targeting acquisitions that advance our position in specific business channels.

Additionally, HUB International Florida, which is part of the HUB South Region, encompasses more than 400 employees and 10 offices throughout Florida.



Today, HUB is one of the largest insurance brokers in the world, a vast network of experts who will use their skills in risk services, claims management and compliance support to help your clients reach their goals.

The HUB Advantage- The privilege is ours, but the advantage is yours.

Dedicated Expertise Creating Tailored Solutions

HUB International, a leading full service global insurance brokerage, delivers tailored products and services to address the most complex asset protection and human capital challenges through a dedicated specialty practice created expressly for governmental and quasi-governmental sector.

Our Value Proposition

We reduce the total cost of organizational risk and relieve administrative burden. As a strategic partner functioning much like an outsourced risk management department, we identify threats to an organization's assets and reputation, suggest practical-cost-effective risk management strategies before insurance, craft broad and efficient commercial risk transfer solutions, and provide hands-on program management, counsel, and advocacy to maximize the value of every insurance contract.

Our Commitment- The HUB Advantage

HUB International is dedicated to maintaining and upholding the highest standards of ethical conduct and integrity in all of our dealings with you, our client. We want to be your trusted risk advisor, and as such, we need to earn your confidence. So we are making a promise. We call it The HUB Advantage. Our mission is to make the advantage yours - and this is our commitment.

- We strive to secure the most favorable terms from insurers, taking into account all of the circumstances - the risk you need to insure, the cost of insurance, the financial condition of the insurer, the insurer's reputation for service, and any other factors that are specific to your situation.

- We are open and honest as to how we are paid for placing your insurance. Our answers to your questions will be forthright and understandable. When we intend to seek a fixed fee for our efforts, we will disclose it to you in writing and obtain your approval prior to coverage being bound.
- You make the ultimate decision as to both the terms of insurance and the company providing your coverage. Our objective is to provide you with choices that meet your insurance needs, and to educate you so your decision is fully informed and best suited to your circumstances.
- We comply with the laws of every jurisdiction in which we operate, including those that apply to how insurance brokerages and agencies are paid. If the laws change, we will respond in a timely and appropriate manner.

We take our responsibility to our customers very seriously. If at any time you feel that we are not fulfilling your expectations - that we are not meeting our Client Commitment - please contact your account executive or call our toll free client hotline at 1-866-857-4073, and your concerns will be addressed as soon as possible.

Resume's, CV or Profiles of the Proposed Project Team

Staff Member	Experience and Licensing	Key Elements to accomplish services required
Brian Scarborough, Area Executive Vice President	25 years of Experience in Risk Management Property/Casualty- 2-20 license Employee Benefits- 2-15 license	Coordinate team and make sure all information is communicated to all parties involved. Provide advice and counsel on contract review and risk assumption and transfer associated with contracts. Advise on the unique risks associated with governmental and quasi-governmental entities.
Bart Gunter, President HUB Public Risk Services	29 years of Experience Employee Benefits 2-15 license Property/Casualty- 2-20 license	Oversees HUB Public Risk accounts.
Jim Duncan, Risk Manager	32 years of experience in Commercial Risk Management and Fleet Risk Management Property/Casualty- 2-20 license	Serve as leader of marketing and placement of insurance. Jim also has extensive experience with automobile and traffic control risk management.
Sam Rogers, CPCU, Area Executive Vice President	35 years of Experience in Risk Management Property/Casualty- 2-20 license Florida Surplus Lines License Employee Benefit License	Service leader for quasi-governmental business and risk management.
Sheila Best CRM, CIC, AAI-Vice President/ Director of Risk Management Property	38 years of Experience in Commercial Account Management Property/Casualty- 2-20 license	New Client On-Boarding, Pre-Renewal Strategy, Market Evaluation, Day-to Day Service and Support.
Teresa Beaudoin, CIC, Commercial Lines Account Manager	40 years of Experience in Commercial Account Management Property/Casualty- 2-20 license	New Client On-Boarding, Pre-Renewal Strategy, Market Evaluation, Day-to Day Service and Support.
Karen Samuels, Financial Products Practice Leader	30 years of experience in Account Management and Financial products Property/Casualty- 2-20 license	Review and advise on risks related to board service, employment practices, cyber liability and fiduciary responsibility.
Teresa Boyd, Chief Marketing Officer	30 years of experience Property/Casualty- 2-20 license	Manage Critical Path Process and supervise marketing of insurance program.
Ron Taylor, EVP- Risk Management	35 years of Experience in Risk Management Property/Casualty- 2-20 license	Develop a risk management plan for all property owned by the City of Gainesville. This will include design of coverage, CAT modeling, and exposure analysis.
James Peterson, Assistant Vice President Risk Management	30 years of Experience in Risk Mitigation and Worker's Compensation Property/Casualty- 2-20 license	Develop a risk management plan and coordinate loss control for all workers compensation, general liability and project worksites.
Karen Dougherty, Claims Manager	35 years of Experience in Claims Management Property/Casualty- 2-20 license	Manages Claims for Florida.
Scott Fouts, VP of Risk Services	17 years of experience in occupational safety, health, and risk management consulting Property/Casualty- 2-20 license	Manages Risk Services for the HUB South Region.
Carrie Cherveney, Esq. Chief Compliance Officer	16 years of Experience Member of the Florida Bar	HR check-up, Employment practices consultation, Employee benefits compliance review, training and educational services.

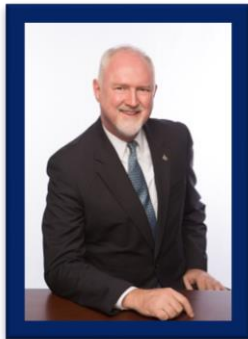
Team Bios

Brian Scarborough, Area Executive Vice President – HUB Gainesville



Brian Scarborough is Executive Vice President of the Gainesville region for HUB International Florida. In this role, he oversees the operations of the Gainesville location and is responsible for new business development. Brian specializes in Property & Casualty Insurance and Employee Benefits with a focus on Commercial Real Estate, Manufacturing, Construction and Healthcare. Brian began his insurance career in 1996 after graduating with a bachelor's degree in History from the University of Florida (Gainesville, FL). He earned his Registered Employee Benefits Consultant designation in 1999 and his Certified Insurance Counselor designation in 2003. Brian has served on the Board of the Florida Association of Insurance Agents and was their Chairman in 2017. He also received the Outstanding Young Agent award from the Independent Insurance Agents & Brokers Association in 2014. Dedicated to giving back to his community, Brian presently serves on the boards of Peaceful Paths Domestic Abuse Center, Citizens for Strong Schools, Gainesville Regional Council for Economic Development, CenterState Bank, and Tyler's Hope for a Dystonia Cure. He also has previously served as Board Chairman for the Gainesville-Alachua County Airport Authority, Gainesville Jaycees, and Alarion Bank's Community Council. Brian received a Community Impact Award from *Business Magazine* in 2014 and Rotary of Gainesville's Ethics in Business Award in 2018.

Bart Gunter, President, HUB Public Risk



Bart Gunter was raised in Orlando, Florida and moved to Tallahassee in 1976. He graduated from Tallahassee Lincoln High School and received an A.A. degree from Tallahassee Community College and a B.A. degree from the University of Florida. After several years as a staff member for former U.S. Senator Bob Graham, Mr. Gunter began his insurance career with Rogers, Atkins Insurance, Inc. in 1991 and became a partner and shareholder of Rogers, Gunter, Vaughn Insurance, Inc. in 2001. In 2016 Mr. Gunter was named President of Rogers, Gunter, Vaughn Ins., and Inc. after being acquired by HUB International; Mr. Gunter has been named HUB Public Risk President. As a licensed life, health and property casualty agent for the last 27 years, Gunter earned the Certified Insurance Counselor (CIC) designation and is ACA Certified Specialist through the National Association of Health Underwriters. As an experienced Risk Manager Gunter has lectured and provided continuing education courses for numerous statewide Associations. He has lead consulting teams for RGVI with the State Department of Insurance, City of Panama City, Leon County, Leon County Schools, Wakulla County Schools, Madison County Schools, Tallahassee Community College and Property and Casualty for the City of Tallahassee. He has also assisted RGVI associates on benefits committees for Florida State University. Mr. Gunter has over 10 years of experience with self-insurance programs.

Jim Duncan, CPCU- Fleet Specialist- Risk Manager



Jim Duncan joined Rogers, Gunter, Vaughn Insurance (RGVI) in 1988 as a Property & Casualty Commercial Lines Sales team member. Jim holds Florida General Lines Property and Casualty, and Life and Health insurance licenses and in 1993 earned the designation of Chartered Property and Casualty Underwriter (CPCU). Jim has served in the position of Sales Manager for RGVI since 2004 and is the agency's leading sales team member. RGVI joined HUB International in 2017. Jim is the lead team member on the City of Tallahassee account. Jim has specialized in the area of developing and managing specially designed programs for state-wide trade associations and in 1993 was recognized by the Florida Movers and Warehousemen's Association for outstanding service to their association.

Sam Rogers, Area Executive Vice President, Tallahassee Office






Sam Rogers graduated from Florida State University in 1982 with a degree in Accounting. He began his insurance career with United States Fidelity & Guarantee Insurance Company as a Surety Bond Underwriter in New Orleans, LA. He returned to Tallahassee to work with Rogers-Atkins Insurance in 1986 and became a partner and shareholder in 1998. He served as the CFO until January 2008, when he assumed the role of CEO. In August 2017, RGVI joined HUB International, where Sam continues to serve as Area Executive Vice President. Sam specializes in insurance for quasi-governmental entities, CPAs, not-for-profit trade associations, lawyers, and other office/professional clients.

Sheila Best CRM, CIC, AAI- Vice President/ Director of Risk Management Property



Sheila Best is currently the Director of Risk Management Property at HUB and her team manage the service plans for large property risks in our Winter Park, Florida, office. She has worked in the insurance industry since 1983, and specifically in the insurance brokerage environment since 1987, where she manages large property programs, casualty risk management programs with large deductibles and self-insurance retentions and executive liability programs. Sheila graduated from the University of South Florida with a Bachelor of Arts degree and has since earned insurance designations as a Certified Risk Manager (CRM), Certified Insurance Counselor (CIC) and Accredited Advisor in Insurance (AAI).

<p>Teresa Beaudoin, CIC- Commercial Lines Account Manager</p> 	<p>Teresa Beaudoin joined Rogers, Gunter, Vaughn Insurance, Inc. (RGVI) in 1980 and currently serves as Manager of the Commercial Lines Department of RGVI. RGVI joined HUB in 2017. She is a licensed property and casualty agent and holds the designation of Certified Insurance Counselor (CIC). As Manager of the Commercial Lines Department, Teresa is responsible for the agency's service personnel for all commercial insurance accounts including many specialty areas in that department.</p>
<p>Karen Samuels, Financial Practices Leader</p> 	<p>Karen Samuels is an Executive Vice President and the Financial Products Practice Leader for HUB International Florida. With over 30 years of experience, Karen oversees the firm's practice for Cyber, Professional Liability and Management Liability insurance coverages. She has worked with many firms over a broad range of industries and has significant expertise in risk management for Financial Institutions, Technology, Life Science and various Professional Firms and Non-profit Organizations. The cornerstone of Karen's practice is providing clients with coverage analysis and recommendations, education and strategic coverage solutions to manage their business risks more effectively. Karen is considered an expert in policy form wording and construction. Most recently, Karen developed an enhanced Cyber insurance product exclusive to HUB clients offering unmatched protection in today's changing Cyber environment. Karen has been a frequent panelist and speaker on the topic of Cyber Insurance and Risk Management for a number of local organizations including the South Florida Banking Institute, Coral Gables Bar Association and the Coral Gables Chamber of Commerce.</p>
<p>Ron Taylor, EVP- Risk Management</p> 	<p>Ron Taylor is currently an Executive Vice President of Risk Management with HUB International in Winter Park, Florida, where he supports the state in large account acquisition and consulting. Ron began his insurance career in 1979 with CNA Insurance Companies. In 24 years at CNA, Ron was involved in underwriting, sales and leadership to include Senior Vice President of Risk Management for the South Central Region in Dallas, Texas. In 2003, he joined KuykendallGardner Risk & Insurance Brokers serving as Vice President of Risk Management, leading the firm's acquisition and management of large accounts. In September 2014, he became Executive Vice President, leading the firm's Commercial Lines organization and continuing his work in large account acquisition.</p>

James Peterson, Assistant Vice President Risk Management



Peterson brings over 30 years of experience in the insurance industry to HUB International, currently serving as Assistant Vice President Risk Management for HUB's Southeast Region located in Florida. In his role, James is responsible for providing technical assistance to clients, marketing of claims and risk consulting services and supporting regional carrier relationships. His work experience includes 16 years with a national insurance carrier. James has held various positions within the claims and risk mitigation areas. He served as a National Accounts Director of Client Services for 6 years. His primary role was to maintain and expand relationships with large, multi-location customers. Designing the client's account planning cycle ensures that their yearly needs and expectations are met.

Karen Dougherty, Claims Manager



Karen Dougherty is the Claims Manger at HUB International in Winter Park, Florida. In this position, she works with our largest clients to provide services which include claim reporting procedures; establishment of Special Handling Requirements; Client Advocate on coverage issues; participating in claim reviews and audits, specializing in reserves and best practices; litigation and reviewing results at stewardship meetings. In over 35 years in the insurance industry, her work experience has included working for insurance carriers, insurance agencies, the owner of an owner wrap-up insurance program and a risk retention program for a national association.

Scott Fouts-VP of Risk Services,



Scott Fouts is the Vice President, HUB South Region in HUB's Risk Services Division. He has 17 years of experience in occupational safety, health, and risk management consulting. He spent 15 years on the carrier side of the business providing risk management, safety, property, product liability, environmental, business continuity, fleet, claims, and industrial hygiene services. He has experience with multiple types of businesses such as large fleet and transportation, construction, manufacturing process, hospitality, educational institutions, healthcare, property management and financial services in order to obtain positive results in the changing of culture and the identification and mitigation of risk. At HUB International, Scott provides technical advice and training at all levels of safety and risk management. He also works with producers and account managers to protect the people, property, and efficiency of our client's operations.

**Carrie B. Cherveney, Esq.,
Chief Compliance Officer**



Carrie B. Cherveney, Esq. currently serves as the Chief Compliance Officer and Senior Vice President of Strategic Client Solutions for the Southeast Region of HUB International. In this role, Carrie is responsible for providing compliance and consulting services regarding general health plans, ACA, ERISA, and other legal matters involving employee benefit programs. Most recently, Carrie was General Counsel and Vice President for a national PEO designing and developing client compliance strategies and solutions. Carrie oversaw both the legal and human resources teams working closely with clients addressing employee relations issues and resolving client concerns. While working previously as a Partner in a West Palm Beach Employment Law firm, Carrie focused her practice in the area of employment litigation and employee relations in both state and federal courts. She has represented private sector employers in litigation under Title VII, the ADA, the ADEA, the FLSA, the FMLA, the Florida Civil Rights Act, and the Florida Whistleblowers' Acts. Carrie has extensive experience counseling employers in EPLI claim prevention, employee discipline and termination, and employment discrimination and harassment.

Carrie received her Bachelor's and a Master's Degree in Speech Communication from the University of South Florida. In 2005, Carrie earned her Juris Doctorate Law from the Stetson College of Law and passed the Florida Bar exam in 2006 becoming licensed to practice law in the state of Florida.

f. Exceptions to the RFP

HUB Public Risk does not take any exceptions to the RFP.

g. Report of Alleged Wrongdoings, Litigation/Settlements/Fines

HUB Public Risk does not have any alleged wrongdoings, litigations, settlements or fines.



E-Required Forms:

b. Bidder Verification Form (Exhibit B)

EXHIBIT B BIDDER VERIFICATION FORM

1. LOCAL PREFERENCE (Check one)

Local Preference requested: YES NO

A copy of the following documents must be included in your submission if you are requesting Local Preference:

- a) Business Tax Receipt
- b) Zoning Compliance Permit

2. QUALIFIED SMALL BUSINESS AND/OR SERVICE DISABLED VETERAN BUSINESS: (Check one)

Is your business qualified, in accordance with the City of Gainesville's Small Business Procurement Program, as a local Small Business? YES NO

Is your business qualified, in accordance with the City of Gainesville's Small Business Procurement Program, as a local Service-Disabled Veteran Business? YES NO

3. LIVING WAGE COMPLIANCE

See Living Wage Decision Tree: (Check one)

Living Wage Ordinance does not apply (check all that apply)

Not a covered service

Contract does not exceed \$100,000

Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.

Located within the City of Gainesville enterprise zone.

Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

4. REGISTERED TO DO BUSINESS IN THE STATE OF FLORIDA

Is Bidder registered with Florida Department of State's, Division of Corporations, to do business in the State of Florida? YES NO (refer to Part 1, 1.6, last paragraph)

If the answer is "YES", provide a copy of SunBiz registration or SunBiz Document Number (# F06000004991) If the answer is "NO", please state reason why: _____

5. DIVERSITY AND INCLUSION (Applies to solicitations above \$50,000)

Does your company have a policy on diversity and inclusion? YES NO

If yes, please attach a copy of the policy to your submittal.

Note: Possessing a diversity and inclusion policy will have no effect on the City's consideration of your submittal, but is simply requested for information gathering purposes.
HUB Public Risk, Inc.

Bidder's Company Name

Bart Gunter, President

Printed Name/Title of Authorized Representative

Bart D. Gunter

Signature of Authorized Representative

4/7/21

Date

This page must be completed and uploaded to DemandStar.com with your Submittal.

Broker/Agent Insurance and Risk Management Consulting Services | RMDX-210025-GD | Page 30 of 37



CITY OF GAINESVILLE

Customer Copy

BUSINESS TAX STATEMENT

TAX YEAR BEGINS OCTOBER 1, 2020 AND ENDS SEPTEMBER 30, 2021

TREASURY DIVISION OF THE DEPARTMENT OF FINANCE

bmailto:cityofgainesville.org

BUSINESS TAX NO.

42801

8/31/2020

BUSINESS NAME AND MAILING ADDRESS

HUB INTERNATIONAL MIDWEST LIMITED
DBA HUB INTERNATIONAL FLORIDA
2811 NW 41ST ST
GAINESVILLE, FL 32606

Agency: 0163
Branch: 0579
Profit Center:
Acquisition: 0147
Approver: Cindy Henson
Description: Business
License #620015

BUSINESS LOCATION

2811 NW 41ST ST

BUSINESS PHONE

352-377-2002

BUSINESS E-MAIL

brian.scarborough@hubinternational.co

Based on your most recent information update, the following is an estimate of your taxes due. These amounts may change if your information has changed.

Table with 3 columns: CATEGORY, DESCRIPTION, TAX FEE. Rows include: 1000 STATE LICENSE/CERTIFICATION REQUIRED (\$0.00), 1001 FICTITIOUS NAME REQUIREMENT (\$0.00), 6215 INSURANCE AGENTS - 2 OR MORE PEOPLE (\$525.00), 9905 PARTIAL PAYMENT (\$0.00), and TOTAL TAX DUE ON OR BEFORE 10/1/2020 (\$525.00).

BUSINESS TAX ACCOUNT INFORMATION VERIFICATION

Before making payment, verify that the Business Location, Mailing Address, Business Phone, and Business Email above are correct. If changes need to be made, please call (352) 334-5024 or email bmailto:cityofgainesville.org with the change(s) and effective date(s). Home Occupation Permit fees, if applicable, subject to change on October 2, 2019.

METHODS OF PAYMENT

- 1. PAY ONLINE AT http://www.cityofgainesville.org (CHOOSE "ONLINE SERVICES"), OR
2. IN THE INTEREST OF PUBLIC SAFETY AND IN RESPONSE TO COVID-19, THE CITY HALL BUILDING IS CLOSED TO THE PUBLIC, PAYMENT BY CHECK MAY BE PLACED IN THE DROP BOX AT CITY HALL, 200 E UNIVERSITY AVE.
3. MAILING ADDRESS: PO BOX 490, STA. 47, GAINESVILLE, FL 32627. MAKE CHECKS PAYABLE TO: CITY OF GAINESVILLE

PENALTIES FOR LATE PAYMENTS (Receipt based on online payment time stamp or envelope postmark date)

Table with 3 columns: Fee schedules based on receipt date, Penalty, Total due. Rows include: Received on or after December 1, 2020, but before January 1, 2021 (\$105.00 penalty, \$630.00 total); Received on or after January 1, 2021 (\$131.25 penalty, \$656.25 total).

Payments not received on or before Wednesday, March 31, 2021 will be assessed an additional STATUTORY PENALTY OF \$250.

APPROVED BY FINANCE DIRECTOR

Florida Statutes require the City to obtain certain documentation PRIOR to the issuance of a business tax receipt. Please e-mail (btdocs@cityofgainesville.org) or fax (352-393-8316) the following documentation:

- A copy of the current fictitious name registration or completed affidavit
• A copy of the current state certificate, registration or license for each licensed professional

If your business does not have current copies of the required documentation on file with the City, you will NOT receive a business tax receipt. You may pay your business tax online prior to submitting the required documents, and a business tax receipt will be e-mailed to you after the required documents are received and verified.

ALL CITY, STATE AND FEDERAL REQUIREMENTS MUST BE MET IN ORDER TO LEGALLY OPERATE A BUSINESS, PROFESSION OR OCCUPATION WITHIN THE CORPORATE LIMITS OF GAINESVILLE, FLORIDA. PAYMENT OF BUSINESS TAXES AND A RECEIPT FOR PAYMENT DO NOT IMPLY THAT A BUSINESS HAS COMPLIED WITH ANY OR ALL OTHER RELEVANT STATUTORY AND REGULATORY PROVISIONS. THE CITY OF GAINESVILLE DOES NOT REFUND BUSINESS TAXES PAID IN ERROR UNLESS THE ERROR IS A CLERICAL MISTAKE MADE BY THE CITY.

If you have any questions about the Business Tax requirements or process, email bmailto:cityofgainesville.org or call 352-334-5024

Thank you for doing business in the City of Gainesville!

Billing Summary for #42801

Business taxes for the current fiscal year **10/1/2020 - 9/30/2021**

Business Details

Business Name	Tax ID	Tax Year
HUB INTERNATIONAL MIDWEST LIMITED CORP	42801	2020

Mailing Address	Physical Address	E-Mail Address
2811 NW 41ST ST GAINESVILLE, FL 32606	2811 NW 41ST ST	brian.scarborough@hubinternational.com RICK.SCARBOROUGH@HUBINTERNATIONAL.COM

Business Categories

ID	Service Name	Tax Amount	Explanation of Calculations
1000	STATE LICENSE/CERTIFICATION REQUIRED	\$0.00	
6215	INSURANCE AGENTS - 2 OR MORE PEOPLE	\$525.00	Per item fee \$47.25. Value submitted for taxation is 19.
	TOTAL:	\$525.00	

Amount Due on **Tuesday, April 06, 2021** is **\$0.00**

Payments must be time-stamped by 11:59 pm on Thursday, October 01, 2020 in order to avoid late fees.

You are required to submit a copy of active state license(s) and a copy of your current fictitious name registration or completed [affidavit](#), before you can receive a Business Tax Receipt. Please fax or email the required documentation to (352) 393-8316 or btdocs@cityofgainesville.org. **When you send in a fax or e-mail, always include your business tax number**



CITY OF GAINESVILLE

Customer Copy

BUSINESS TAX RECEIPT
BILLING AND COLLECTIONS OFFICE
TREASURY DIVISION OF THE FINANCE DEPARTMENT
btmail@cityofgainesville.org

TAX YEAR BEGINS OCTOBER 1, 2020
AND ENDS SEPTEMBER 30, 2021

Please display in your
place of business

BUSINESS TAX NO.
42801



BUSINESS NAME AND MAILING ADDRESS

HUB INTERNATIONAL MIDWEST LIMITED CORP
DBA HUB INTERNATIONAL FLORIDA
2811 NW 41ST ST
GAINESVILLE, FL 32606

BUSINESS LOCATION
2811 NW 41ST ST

BUSINESS PHONE
352-377-2002

BUSINESS E-MAIL
brian.scarborough@hubinternational.co

Thank you for paying your business taxes for the period October 1, 2020 – September 30, 2021.

Table with 3 columns: CATEGORY, DESCRIPTION, TAX FEE. Rows include STATE LICENSE/CERTIFICATION REQUIRED, FICTITIOUS NAME REQUIREMENT, INSURANCE AGENTS - 2 OR MORE PEOPLE, and summary rows for TOTAL ASSIGNED, TOTAL PAID, and AMOUNT DUE.

APPROVED BY FINANCE DIRECTOR



6483720561FD442E8E111F34CD33A5A3

ALL CITY, STATE AND FEDERAL REQUIREMENTS MUST BE MET IN ORDER TO LEGALLY OPERATE A BUSINESS, PROFESSION OR OCCUPATION WITHIN THE CORPORATE LIMITS OF GAINESVILLE, FLORIDA. PAYMENT OF BUSINESS TAXES AND A RECEIPT FOR PAYMENT DOES NOT IMPLY THAT A BUSINESS HAS COMPLIED WITH ANY OR ALL OTHER RELEVANT STATUTORY AND REGULATORY PROVISIONS.

THE CITY OF GAINESVILLE DOES NOT REFUND BUSINESS TAXES PAID IN ERROR UNLESS THE ERROR IS A CLERICAL MISTAKE MADE BY THE CITY.

If you have any questions about the Business Tax requirements or process, please email btmail@cityofgainesville.org

If you cannot email to the address above, please call (352) 334-5024

IT IS THE BUSINESS OWNER'S RESPONSIBILITY TO REPORT ANY CHANGES IN BUSINESS INFORMATION DURING THE YEAR TO btmail@cityofgainesville.org OR TO WEB SITE http://eservices.cityofgainesville.org

[Previous On List](#) [Next On List](#) [Return to List](#)

[Events](#) **No Name History**

Detail by FEI/EIN Number

Foreign Profit Corporation
HUB INTERNATIONAL MIDWEST LIMITED CORPORATION

Filing Information

Document Number	F0600004991
FEI/EIN Number	35-0672425
Date Filed	07/28/2006
State	IN
Status	ACTIVE
Last Event	CORPORATE MERGER
Event Date Filed	12/21/2017
Event Effective Date	12/31/2017

Principal Address

55 EAST JACKSON BLVD
CHICAGO, IL 60604

Mailing Address

HUB's Diversity and Inclusion Policy

HUB's DEI journey is emblematic of what makes HUB so special – the entrepreneurial spirit of our local offices and local teams matched with the power of HUB's company-wide resources. Five years ago, a local HUB office launched the first chapter of HUB Women Network. Over the next 5 years, this grew across all of California. Two years ago – HUB Women California merged with another organic effort – HUB Women in Sales Network and became our first company-wide Employee Resource Group (ERG). It is now across all of Canada and the US. We have HUB Women Ambassadors near the Arctic Circle and as far south as Puerto Rico. HUB Women Network was a 2020 finalist for the Business Insurance D&I award for positive impact across the sector.

Our CEO and EMT are committed to Diversity, Equity, and Inclusion at HUB International. One of our guiding principles is Focusing on Our People, and a key part of this pillar is recognizing and honoring the diverse backgrounds of our employees. Marc Cohen shared with the company, "While HUB is only one piece in a much larger puzzle, we must do our part to support diversity and actively stand against discrimination. By educating ourselves and fostering a supportive environment we can ensure that HUB is living up to its values. It is no surprise that I'm already hearing conversations across our organization about employees embracing this message and taking steps to ensure that our actions are sustainable" (June, 2020).

Marc and our corporate Executive Management Team are working with Bridge Arrow Consultants on a strategic review, assessment, and DEI path forward for HUB. At HUB, we know for DEI to be sustainable, it has to be woven into our business practices, our talent/people practices, and our local communities. Bridge Arrow is helping us to better understand what that path will be, steps it will include, the role and accountabilities of our internal DEI leader, and also how we will support our employees in a sustainable and authentic way. We are currently working to understand our current state, conducting senior stakeholder interviews and aligning training at the ECM level. These are just a few of our first next steps. We appreciate there will be many other important steps in our future work with DEI. And, part of our work with Bridge Arrow is to provide clarity and alignment on the work and accountabilities that will belong to our DEI leader. This is an important preparation step, both for candidates and for HUB, to hiring our own internal DEI leader, which we will be doing in 2021 (as early as possible).

A few other DEI actions to date include:

- Hosted numerous 'safe space' discussions around HUBs – spearheaded by local HR and local leadership
- Held DEI specific sessions as part of our inaugural HUB Summer Camp series
- Launched Strategic Diversity Recruiting project team
- Sponsored HUB women to attend Career Ladder Conference (geared towards Black women in the workforce)
- Created Company-wide DEI resource page –covers multiple dimensions of diversity, equity and inclusion
- Created custom learning channel on our online learning platform

- Partnering with subject matter experts in the development of our DEI education series
- Embedding DEI principles into our talent/people practices (from the candidate experience and onboarding through performance management, leadership, and more)
- Employee experience – DEI has always been a lens through which we measure our employee engagement survey results

c. Price Proposal Form

PART 3 – PRICE PROPOSAL

Proposer Company Name: HUB Public Risk, Inc.

The City prefers a fixed fee contract, but will consider other remuneration strategies. Full disclosure of all revenues generated from the services performed under this contract is required. It is the City's preference to have a fee based cost proposal which should identify which of the required services are included in the fee and any additional fees that may be incurred

Fee based cost: \$139,000

NOTE: When cost estimating air travel, the City allows for Coach fare only. In addition, long distance phone calls, printing, and other administrative costs may be billed at cost only – no mark-up. Evidence of these expenditures will be submitted when invoicing the City.

Submitted by:

Bart Gunter
Name (printed)

Bart D. Gunter
Signature

April 7, 2021
Date

President
Title

[THE REMAINDER OF THIS PAGE IS INTENTIONALLY BLANK]

d. Drug-Free Workplace Form (Exhibit A)

EXHIBIT A DRUG-FREE WORKPLACE FORM

The undersigned bidder in accordance with Florida Statute 287.087 hereby certifies that

HUB Public Risk, Inc. does:
(Name of Bidder)

- a. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
- b. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for the drug abuse violations.
- c. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
- d. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
- e. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
- f. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this bidder complies fully with the above requirements.



Bidder's Signature

April 7, 2021

Date

In the event of a tie bid, bidders with a Drug Free Workplace Program will be given preference. To be considered for the preference, this document must be completed and uploaded to DemandStar.com with your Submittal.

e. References Form

EXHIBIT C REFERENCE FORM

Company Name of Bidder: HUB Public Risk, Inc.

Provide information for three references of similar scope performed within the past three years.
You may include photos or other pertinent information.

#1 Year(s) services provided (For Example: 1/2018 to 12/2019): 2014 to present
Company Name: City of Tallahassee
Address: 300 S. Adams Street
City, State Zip: Tallahassee, Florida 32301
Contact Name: Arthur Pitts
Phone Number: (850) 891-8380 Fax Number: _____
Email Address: arthur.pitts@talgov.com

#2 Year(s) services provided (For Example: 1/2018 to 12/2019): 2016 to present
Company Name: City of Mobile
Address: P.O. Box 1827
City, State Zip: Mobile, AL 36633
Contact Name: Daniel Davis
Phone Number: (251) 208-7892 Fax Number: _____
Email Address: ddavis@cityofmobile.org

#3 Year(s) services provided (For Example: 1/2018 to 12/2019): 2003 to Present
Company Name: City of Fort Worth
Address: 200 Texas Street
City, State Zip: Fort Worth, TX 76102
Contact Name: Mark Barta
Phone Number: (817) 392-7790 Fax Number: _____
Email Address: mark.barta@fortworthtexas.gov

This page must be completed and uploaded to DemandStar.com with your Submittal.
Broker/Agent Insurance and Risk Management Consulting Services | RMDX-210025-GD | Page 31 of 37

f. Certification of Compliance with Living Wage

EXHIBIT E CERTIFICATION OF COMPLIANCE WITH LIVING WAGE

The undersigned hereby agrees to comply with the terms of the Living Wage Ordinance and to pay all covered employees, as defined by City of Gainesville Ordinance 020663 as amended at 030168 (Living Wage Ordinance), during the time they are directly involved in providing covered services under the contract with the City of Gainesville for a living wage of \$12.5962 per hour to covered employees who receive Health Benefits from the undersigned employer and \$13.8462 per hour to covered employees not offered health care benefits by the undersigned employer.

Name of Service Contractor/Subcontractor: HUB Public Risk, Inc.

Address: 2811 NW 41 Street, Gainesville, Florida 32606

Phone Number: (352) 727-4632

Name of Local Contact Person: Brian Scarborough

Address: 2811 NW 41 Street, Gainesville, Florida 32606

Phone Number: (352) 727- 4632

\$ \$139,000
(Amount of Contract)

Bart Gunter, President

Printed Name/Title of Authorized Representative

Bart D. Gunter

4/7/21

Signature of Authorized Representative

Date

g. Bidder's W-9

Form W-9 (Rev. October 2018) Department of the Treasury Internal Revenue Service	Request for Taxpayer Identification Number and Certification ▶ Go to www.irs.gov/FormW9 for instructions and the latest information.	Give Form to the requester. Do not send to the IRS.
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Print or type. See Specific instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. HUB Public Risk, Inc.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) ▶ _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
	5 Address (number, street, and apt. or suite no.) See instructions. 1117 Thomasville Road	Requester's name and address (optional)
	6 City, state, and ZIP code Tallahassee, Florida 32303	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)																															
Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later.	Social security number <table border="1" style="width:100%; text-align: center;"> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </table> or Employer identification number <table border="1" style="width:100%; text-align: center;"> <tr><td>8</td><td>3</td><td>-</td><td>2</td><td>1</td><td>0</td><td>0</td><td>7</td><td>3</td><td>2</td></tr> </table>																					8	3	-	2	1	0	0	7	3	2
8	3	-	2	1	0	0	7	3	2																						
<small>Note: If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.</small>																															

Part II Certification	
Under penalties of perjury, I certify that:	
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined below); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.	
Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.	

Sign Here	Signature of U.S. person ▶	Date ▶ <u>3/10/20</u>
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

h. Copy of any applicable current licenses and/or certification required by City/County/State

HUB Public Risk, Inc. is authorized to conduct business in the State of Florida. Please see State of Florida license and Sunbiz information below:

Agency License: L105803

Tax ID: 35-0672425

FLORIDA DEPARTMENT OF FINANCIAL SERVICES

HUB PUBLIC RISK INC

1117 THOMASVILLE ROAD
TALLAHASSEE FL 32308

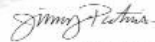
Agency License Number L105803

Location Number: 319165

Issued On 06/19/2019

Pursuant To Section 626.0428, Florida Statutes, This Agency Location Shall Be In The Active Full-Time Charge Of A Licensed And Appointed Agent Holding The Required Agent Licenses To Transact The Lines Of Insurance Being Handled At This Location

Pursuant To Subsection 626.172(4), Florida Statutes, Each Agency Location Must Display The License Prominently In A Manner That Makes It Clearly Visible To Any Customer Or Potential Customer Who Enters The Agency Location.



Jimmy Palomis
Chief Financial Officer
State of Florida

Team Insurance Licenses

FLORIDA DEPARTMENT OF FINANCIAL SERVICES

BRIAN RICHARD SCARBOROUGH

License Number : A233169

Resident Insurance License	Issue Date
• 0214 - LIFE INCL VARIABLE ANNUITY	02/04/1997
• 0215 - LIFE INCL VAR ANNUITY & HEALTH	02/04/1997
• 0240 - HEALTH	02/04/1997
• 0218 - LIFE & HEALTH	02/04/1997
• 0220 - GENERAL LINES (PROP & CAS)	03/19/1997
• 0216 - LIFE	02/04/1997

Please Note: A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2815 or 648.395, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://dofa.fds.com>. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/DivisionAgents>

Jeff Atwater
Jeff Atwater
Chief Financial Officer
State of Florida

FLORIDA DEPARTMENT OF FINANCIAL SERVICES

SHEILA ANNETTE BEST

License Number : A021020

Resident Insurance License	Issue Date
• 0220 - GENERAL LINES (PROP & CAS)	12/29/1983

Please Note: A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2815 or 648.395, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://dofa.fds.com>. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/DivisionAgents>

Jeff Atwater
Jeff Atwater
Chief Financial Officer
State of Florida

FLORIDA DEPARTMENT OF FINANCIAL SERVICES

BARTLETT DAVID GUNTER

License Number : A106729

Resident Insurance License

- 0216 - LIFE
- 0220 - GENERAL LINES (PROP & CAS)
- 0218 - LIFE & HEALTH

Issue Date

12/01/1992
05/04/1991
12/01/1992

Please Note: To validate the accuracy of this license you may review the individual or business entity's license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/Division/Agents>.


Jeff Atwater
Chief Financial Officer
State of Florida

FLORIDA DEPARTMENT OF FINANCIAL SERVICES

TERESA LYNN BEAUDOIN

License Number : A017038

Resident Insurance License

- 0220 - GENERAL LINES (PROP & CAS)

Issue Date

08/13/1985

Please Note: A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2815 or 648.285 Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at <https://dofs.fds.com>. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/Division/Agent>.


Jeff Atwater
Chief Financial Officer
State of Florida

FLORIDA DEPARTMENT OF FINANCIAL SERVICES

JAMES DARBY DUNCAN

License Number : A073251

Resident Insurance License

- 0218 - LIFE & HEALTH
- 0240 - HEALTH
- 0220 - GENERAL LINES (PROP & CAS)

Issue Date

01/07/1989
01/07/1989
01/09/1988

Please Note: To validate the accuracy of this license you may review the individual or business entity's license record under "Licensee Search" on the Florida Department of Financial Services website at <http://www.MyFloridaCFO.com/Division/Agents>.



Jeff Atwater
Chief Financial Officer
State of Florida

i. Copies of all Addenda, signed



City of Gainesville

Budget and Finance Department
Purchasing Division

- e. Question:
Does the City plan to split the program? 1 Broker for Property and 1 Broker for Liability?
Answer:
That is not ruled out but the City's preference is for a single broker/consultant

- f. Question:
Why was the Auto Liability policies and Special Event policy not renewed?
Answer:
All of the special events that were covered under the policy were either canceled or went virtual due to the pandemic. The Auto Liability policy was not renewed because of changes in our take home/stand by polices.

- g. Question:
Please provide the name of the current insurance broker for the City of Gainesville and the amount of annual compensation they are receiving.
Answer:
Marsh USA, Inc. Fixed fee, \$220,000

- h. Question:
The RFP provided a schedule of insurance that overlaid "non-renewed" over certain policy dates. Please see screenshot below for example. Can you provide a schedule of insurance that restores those dates and also provides policy premiums?
Answer:
The scheduled provided previous policy numbers, policy periods were 10/1/2019 - 9/30/2020

- i. Question:
Please provide a 10-year loss history for all policies.
Answer:
The City won't be able to get this by Wednesday, however, we will provide to the successful bidder upon reward of contract and as part of our renewal strategy.

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 1 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 1 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER COMPANY NAME: HUB Public Risk, Inc.

SIGNATURE: *Bart D. Gunter*

LEGIBLY PRINT NAME: Bart Gunter

DATE: 4/7/21